

DM tool + Clinical  
experience + Value-added  
services

Fig. 1

# How the Money Flows Around the NETWORK

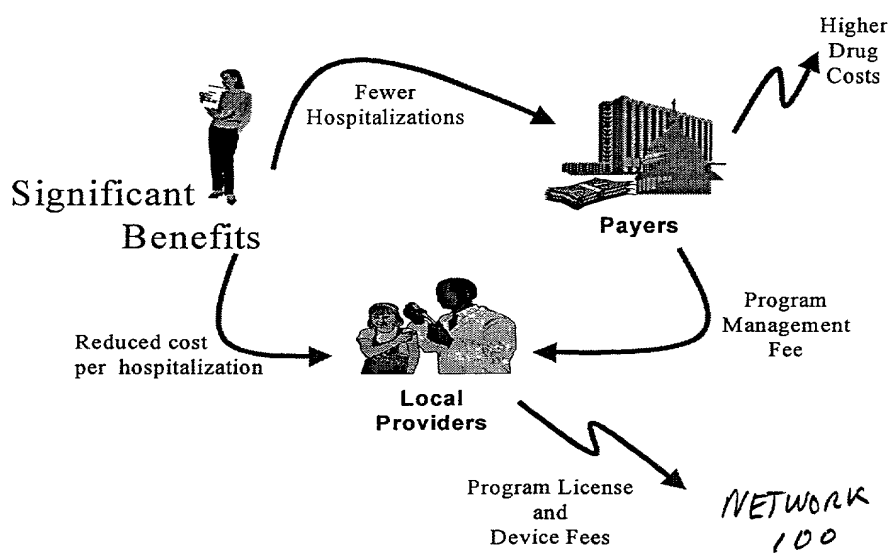
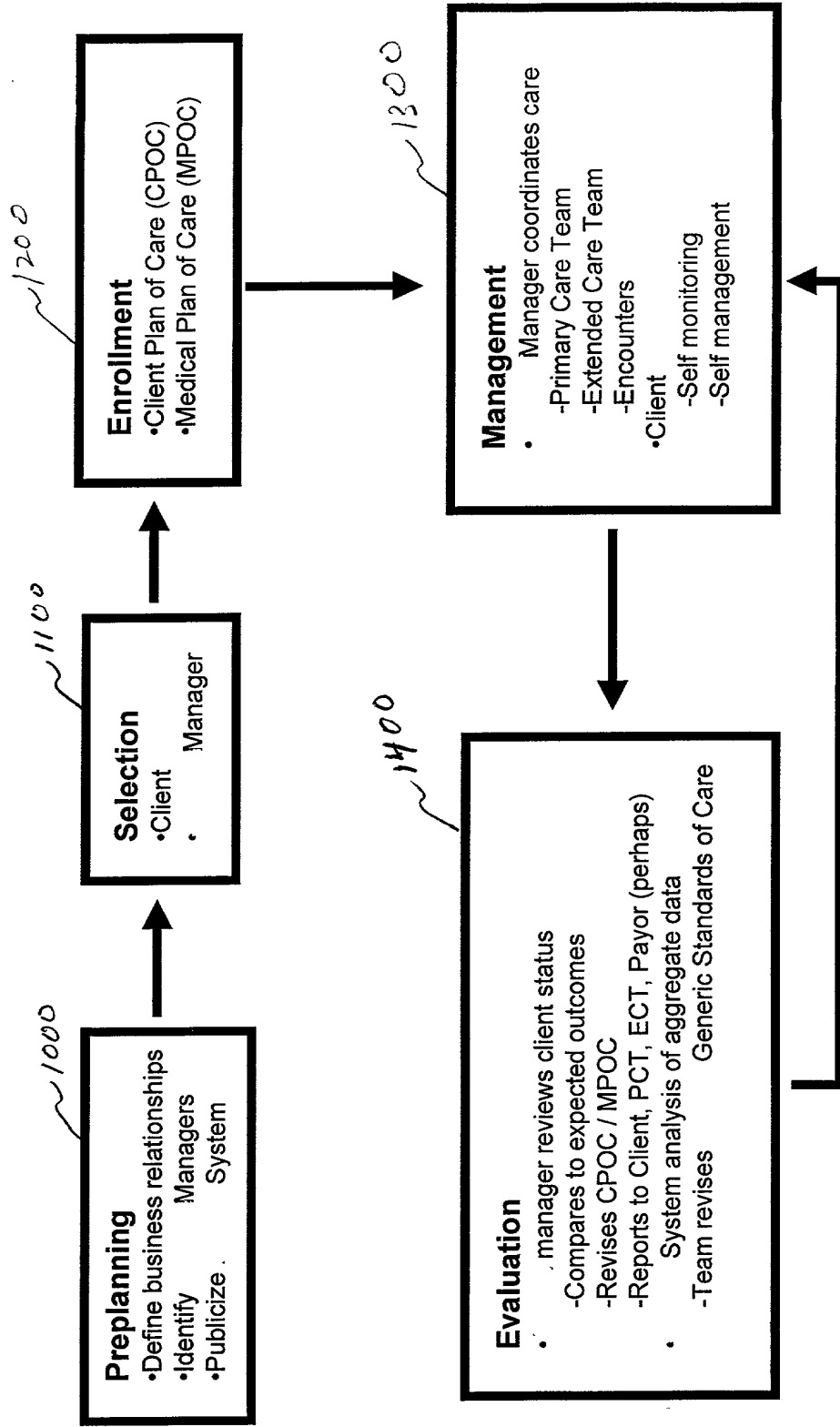
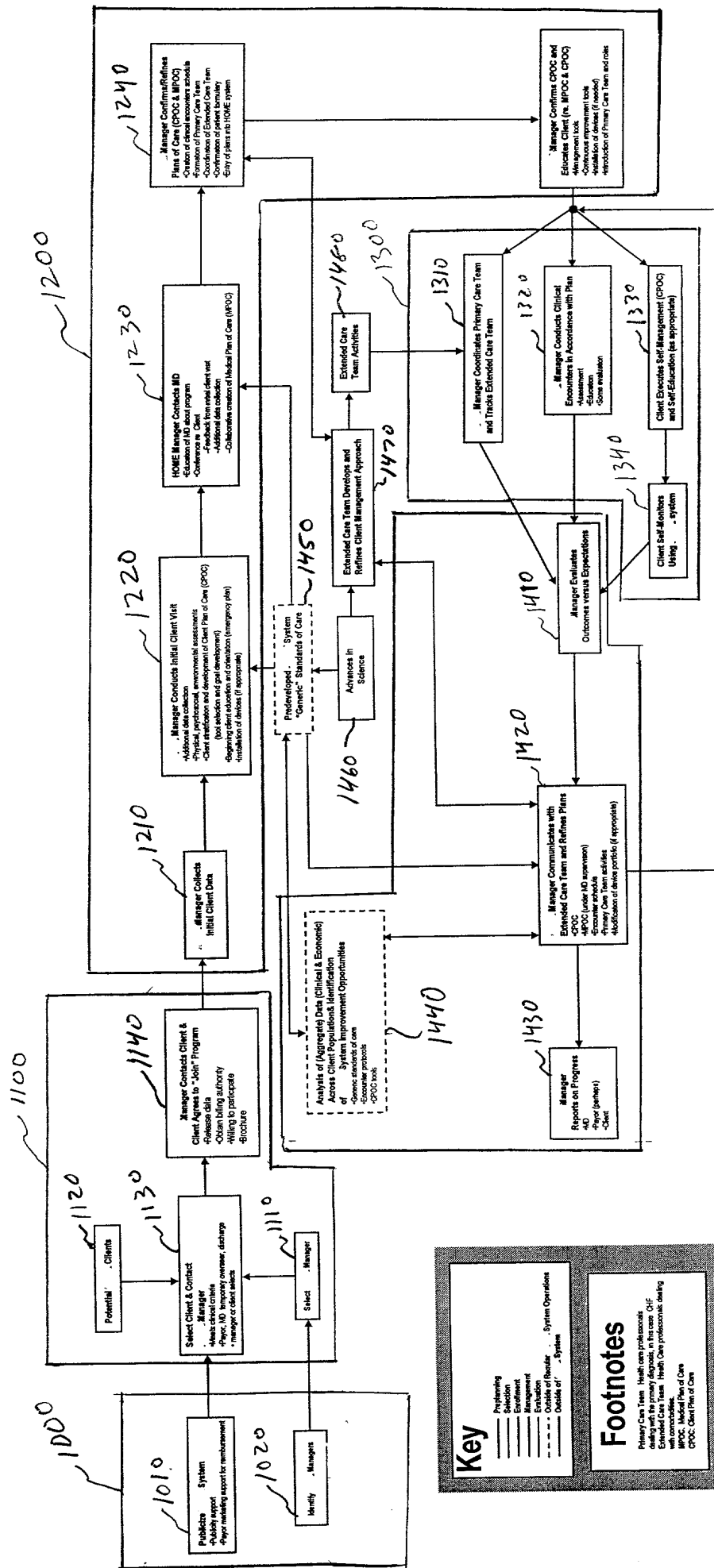


FIG. 2



PCT: Primary Care Team (concerned with primary diagnosis, i. e. CHF)  
 ECT: Extended Care Team (concerned with other medical conditions)

FIG. 3



F16. 4

Care Steps	Client	Roles & Responsibilities				System
		Physician	Payor	Manager	Primary Care Team	Extended Care Team
Pre Planning i. Publicize system						
ii. Identify potential clients			Receives information regarding the program and negotiates with regional customer.			

Primary Care Team  
 (PCT)  
 Extended Care Team  
 (ECT)  
 Medical Plan of Care  
 (MPOC)  
 Client Plan of Care  
 (CPOC)

Health Care Professionals  
 dealing with the primary  
 diagnosis  
 Health Care Professionals  
 dealing with comorbidities  
 Plan of care set by the  
 physician  
 Plan of care collaboratively  
 set by nurse, client & PCT  
 to integrate MPOC into  
 lifestyle

F16.5

Care Steps	Roles & Responsibilities				
	Client	Physician	Payor	Manager	Primary Care Team
1. Select Client for program	<ul style="list-style-type: none"> <li>May inquire of Manager regarding program participation</li> </ul>	<ul style="list-style-type: none"> <li>Uses "Inclusion and Exclusion" criteria to evaluate client for program.</li> <li>Calls with client recommendation</li> </ul>	<ul style="list-style-type: none"> <li>Uses "Inclusion and Exclusion" criteria to evaluate client for program.</li> <li>Calls with client recommendation.</li> <li>Coordinate with hospital discharge planners</li> </ul>	<ul style="list-style-type: none"> <li>Receives client recommendation</li> </ul>	
2. Manager contacts client, and client agrees to join program	<ul style="list-style-type: none"> <li>Receive call from manager and verbally agree to participate in the program.</li> <li>Schedule date for visit with manager</li> </ul>	<ul style="list-style-type: none"> <li>Receive notification of client agreement to participate in program</li> </ul>	<ul style="list-style-type: none"> <li>Receive notification of client agreement to participate in the program</li> </ul>	<ul style="list-style-type: none"> <li>Contact referred client,</li> <li>describe program</li> <li>elicit verbal agreement to participate</li> <li>ask brief summary questions to determine if patient meets inclusion criteria</li> <li>Notify payor &amp; MD, of client agreement to participate.</li> <li>Schedule date for visit with client.</li> </ul>	<ul style="list-style-type: none"> <li>Lists all clients selected as potential clients.</li> <li>Lists clients who agree to participate.</li> <li>Lists clients who do not agree to participate</li> </ul>

Exclusion	Criteria
1. Unable to read or speak English	4. Younger than 18 years old
2. Deaf	5. Unwilling to have telephone.

Inclusion	Criteria
1. Primary diagnosis of CHF	
2. High risk of future admissions	

FIG. 6

Roles & Responsibilities					
Care Steps	Client	Physician	Payor	Manager	System
3. Manager collects initial client data	<ul style="list-style-type: none"> <li>Shares information required for initial enrollment</li> </ul>			<ul style="list-style-type: none"> <li>Collects demographic data for enrollment</li> <li>Enters initial data into system</li> </ul>	<ul style="list-style-type: none"> <li>Receives initial data entry for enrollment/</li> </ul>
4. Manager conducts client visit	<ul style="list-style-type: none"> <li>Stays for visit</li> <li>Participates in visit by sharing accurate information</li> </ul>			<ul style="list-style-type: none"> <li>Receives client signatures on:                             <ul style="list-style-type: none"> <li>Medical information release</li> <li>Bill of rights</li> </ul> </li> <li>Conducts client interview:                             <ul style="list-style-type: none"> <li>Medical history</li> <li>Physical, psychosocial, environmental, risk factor assessment</li> <li>SF 36</li> </ul> </li> <li>Sets &amp; instructs emergency plan</li> <li>Orients client to system</li> <li>Installs devices as needed</li> </ul>	<ul style="list-style-type: none"> <li>Receives acknowledgement of agreement to participate</li> <li>Receives medical information release</li> <li>Receives bill of rights</li> <li>Receives history, assessment and survey data</li> <li>Receives emergency plan</li> <li>Acknowledges link with client interactive devices, eg BP, Scale, ECG</li> </ul>
5. Manager contacts MD		<ul style="list-style-type: none"> <li>Receives call from Manager</li> <li>Shares important information re: client</li> </ul>		<ul style="list-style-type: none"> <li>Contacts primary and extended care MD's regarding client care</li> <li>Educates MD regarding program as needed</li> <li>Conferences with MD re:                             <ul style="list-style-type: none"> <li>Initial assessment data</li> <li>Results of data collection tools</li> <li>Initial physician-set MPOC</li> </ul> </li> <li>Enters MPOC, assessment data &amp; data collection results into system</li> </ul>	<ul style="list-style-type: none"> <li>Receives call from Manager regarding client</li> <li>Shares MPOC regarding comorbidities with Manager</li> </ul>
6. Manager confirms & refines plans of care (CPOC & MPOC)		<ul style="list-style-type: none"> <li>Receives MPOC from Manager and signs confirmation. Communicates any discrepancies</li> </ul>		<ul style="list-style-type: none"> <li>Based upon initial assessment data, data collection results and MPOC's for heart failure and comorbidities, the Manager forms the primary care team                             <ul style="list-style-type: none"> <li>Creates the clinical encounter schedule</li> <li>Coordinates with Extended Care Team</li> <li>Confirmation of patient formulary</li> <li>Develops initial client plan of care</li> </ul> </li> <li>Enter CPOC into system</li> <li>Send MPOC &amp; CPOC to MD for confirmation</li> </ul>	<ul style="list-style-type: none"> <li>Receives completed encounter schedule</li> <li>Confirms patient formulary with the Manager</li> <li>Receives MPOC &amp; CPOC from Manager</li> <li>Sends encounter schedule to client's web TV</li> </ul>

FIG. 7

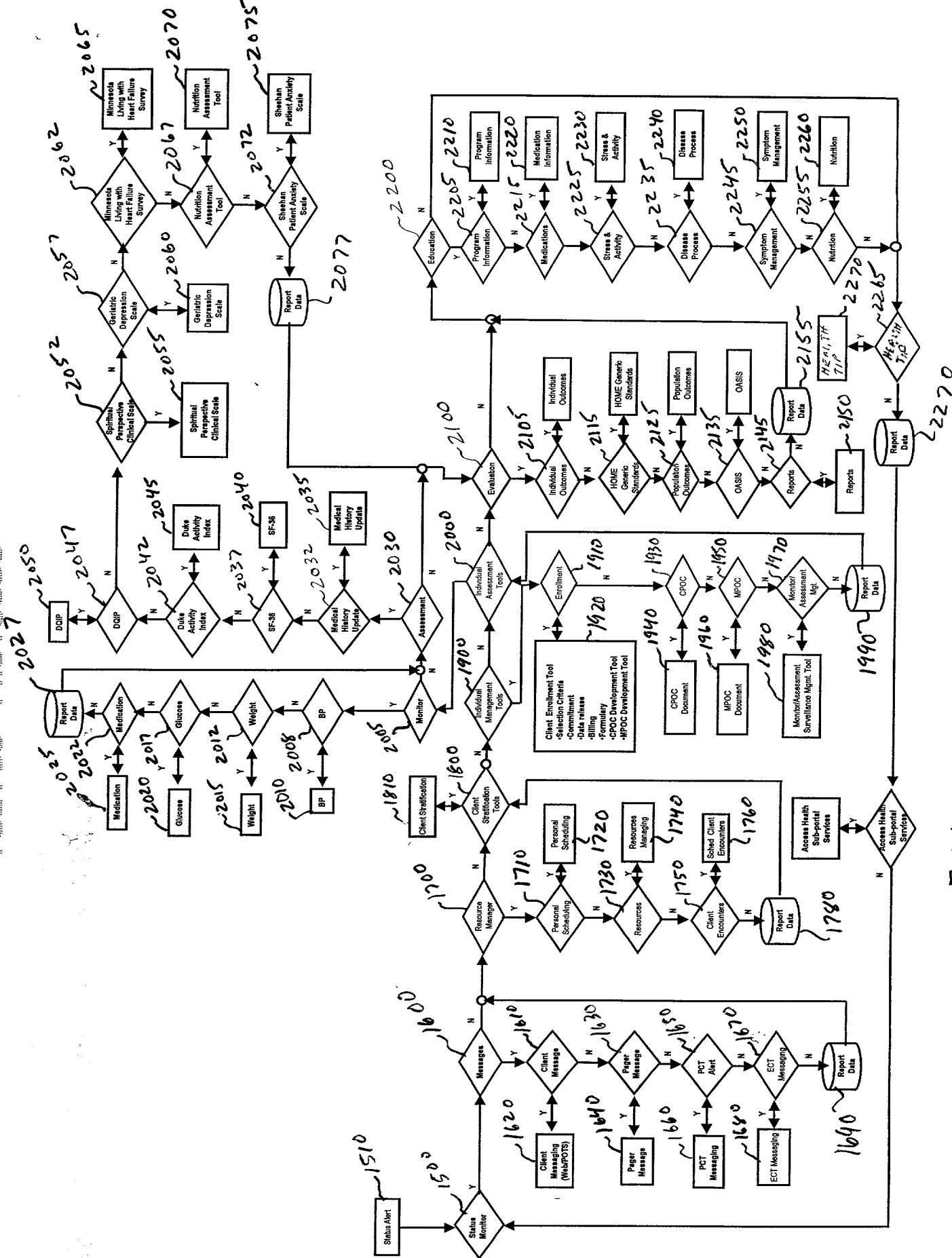
F/6.8



Care Steps		Roles & Responsibilities					System	
		Client	Physician	Payor	Manager	Primary Care Team	Extended Care Team	
<b>Evaluation</b>								
9	Manager evaluates outcomes versus expectations	<ul style="list-style-type: none"> <li>▾ Learns ongoing evaluation of personal response and outcomes to MPOC &amp; CPOC</li> </ul>			<ul style="list-style-type: none"> <li>▾ Reviews client data regularly</li> <li>▾ Evaluates whether data is consistent with expected outcomes</li> <li>▾ Communicates with client regarding inconsistent outcomes</li> </ul>	<ul style="list-style-type: none"> <li>▾ Evaluates aggregate data, clinical, &amp; economic</li> <li>▾ Suggests potential System and care improvement opportunities</li> </ul>		<ul style="list-style-type: none"> <li>▾ Archives, surveys, or sends data/messages from client to Manager for evaluation</li> <li>▾ Sends aggregate data to Manager and designated primary care team members</li> <li>▾ Supports additional data process analyses</li> </ul>
10	Analysis of aggregate, clinical & economic data across client populations identify System improvement opportunities				<ul style="list-style-type: none"> <li>▾ Coordinates primary care team conference regarding patient outcomes</li> <li>▾ Communicates client outcomes to MD</li> <li>▾ Collaborates on plan (CPOC &amp; MPOC) refinement</li> <li>▾ Communicates with Extended Care Team regarding pertinent client outcomes and collaborates on plan refinement if appropriate</li> </ul>			<ul style="list-style-type: none"> <li>▾ Documents all client specific communications</li> <li>▾ Receives MPOC &amp; CPOC refinements from Manager</li> </ul>
11	Manager communicates with primary and extended care team re client outcomes and refines plans	<ul style="list-style-type: none"> <li>▾ Learns ongoing evaluation of personal response and outcomes to MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives call from Manager regarding client outcomes</li> <li>▾ Modifies MPOC as needed</li> </ul>				<ul style="list-style-type: none"> <li>▾ Participates in conference/review of client outcomes</li> <li>▾ Collaborates in CPOC modification</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives call from Manager regarding pertinent client outcomes and refines MPOC as needed</li> </ul>
12	Manager reports on client progress	<ul style="list-style-type: none"> <li>▾ Receives client outcomes report from System</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives member's aggregate report</li> </ul>		<ul style="list-style-type: none"> <li>▾ Initiates outcomes report creation and sends to client, MD, primary care team and payor</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives client outcomes report</li> </ul>		<ul style="list-style-type: none"> <li>▾ Reminds Manager when outcome's reports are due</li> <li>▾ Creates outcome reports per Manager's request</li> </ul>
6 / 10	Manager confirms refined plans and educates the client	<ul style="list-style-type: none"> <li>▾ Receives new instruction on refined MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▾ Confirms refined MPOC</li> </ul>		<ul style="list-style-type: none"> <li>▾ Confirms and communicates refined MPOC &amp; CPOC to client, MD, primary care team and extended care team</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives refined MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▾ Confirms refined MPOC</li> </ul>	<ul style="list-style-type: none"> <li>▾ Receives entry of refined MPOC &amp; CPOC into system</li> </ul>

F16. 9





F/G. 11

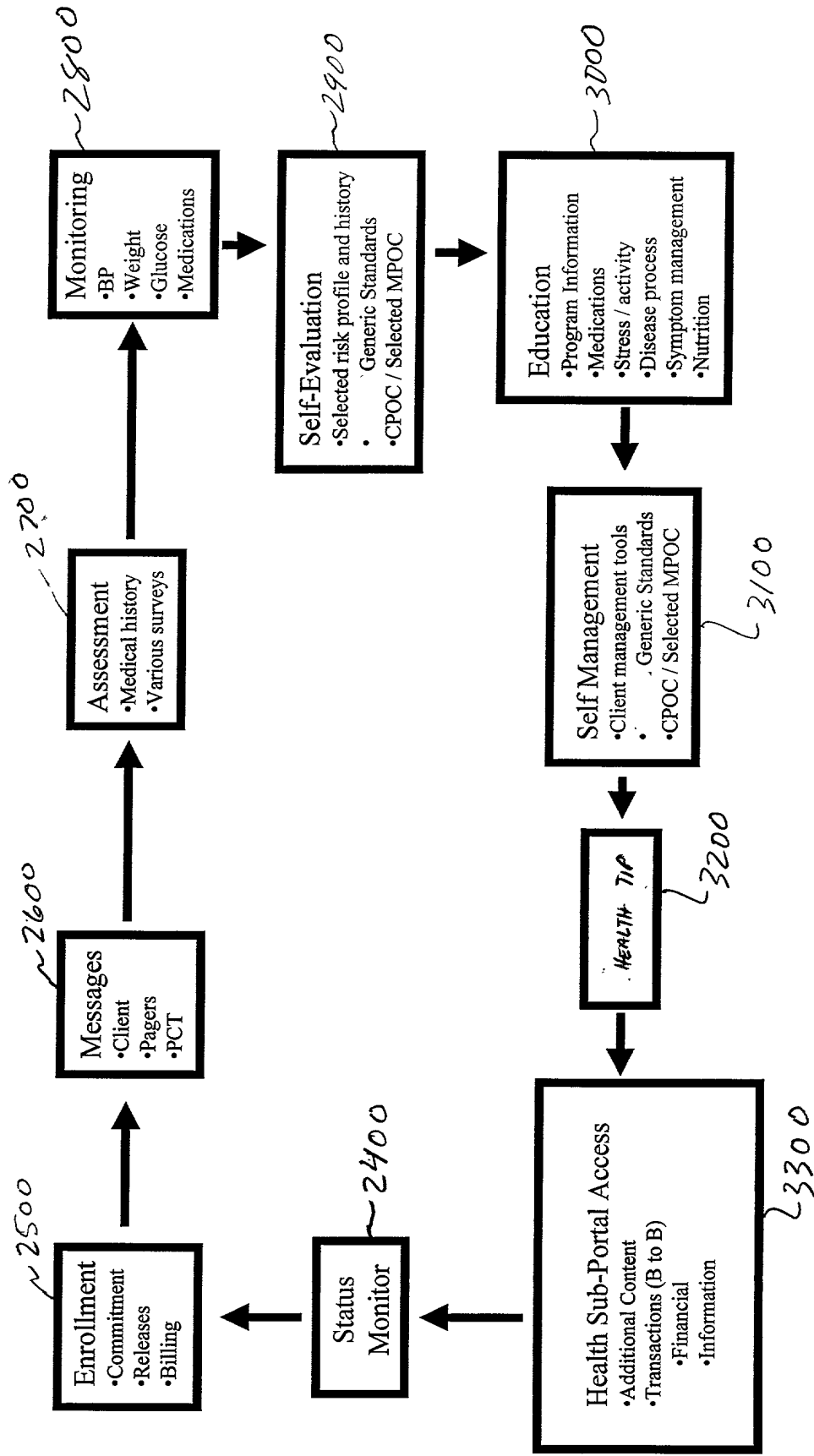


FIG. 12

FIG. 13

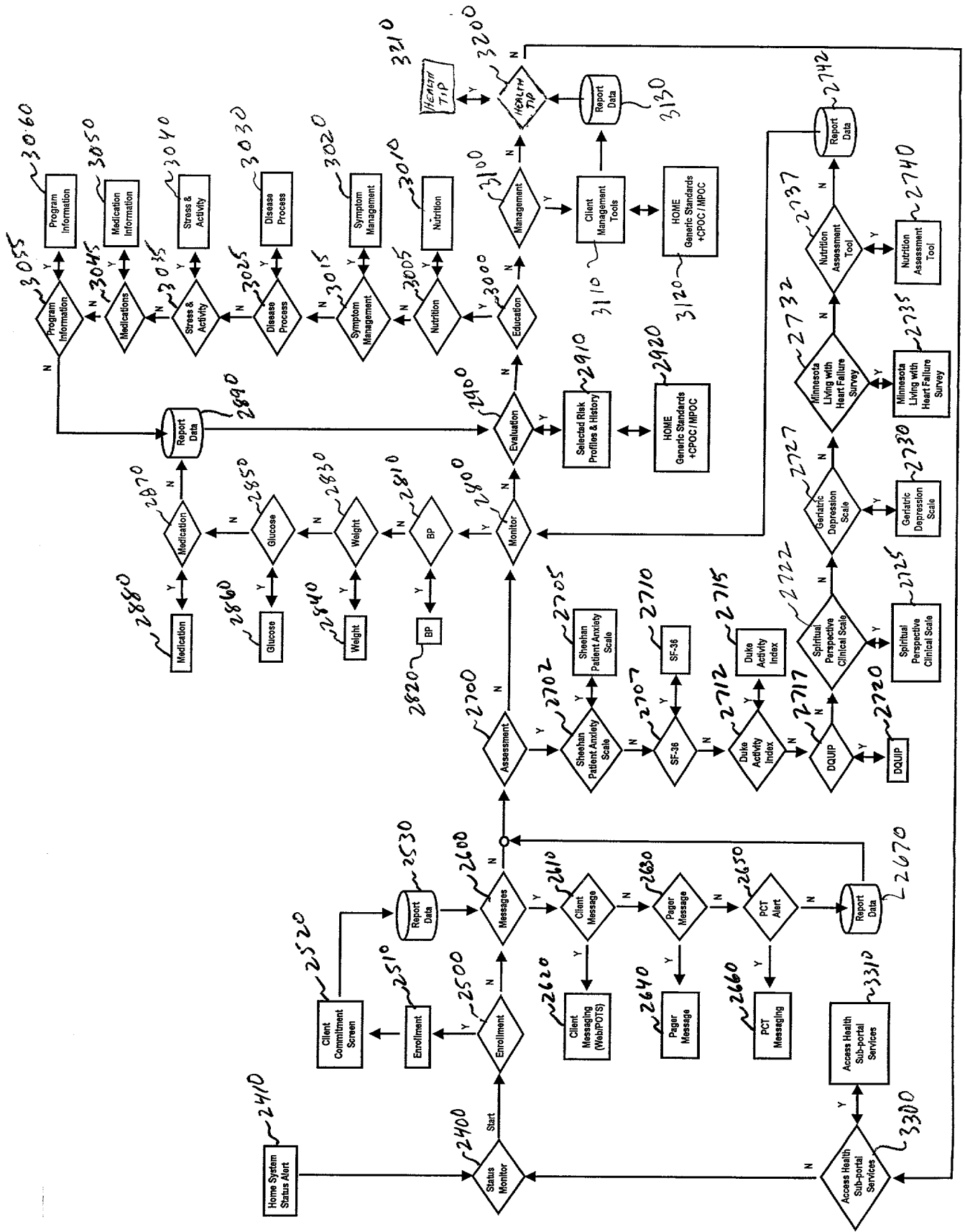


FIG. 13